INSTRUCTIONS – Using the On-Line TOS Wizard (Part B)

The Transfer of Service Portal has been renovated to provide you with a practical process to submit the *PI-5000 Transfer of Service (TOS) on-line application* related to your district. Your district received an email with notification that another Wisconsin school district had completed a Transfer of Service Part A and indicated the student transferred from your school district.

The School Financial Services team is upgrading the department's on-line security system. The 2013 Fiscal Year TOS on-line application security will be processed through the *Application User Management* system. The district administrators already have some familiarity with it, as it is used for both *Open Enrollment* (OPAL) and *Homeschool Reporting* (HOMER) applications.

<u>**Authorizing Additional Users**</u>
All school district administrators are authorized to access the *Transfer of Service-LEP* and *Transfer of Service-SPED* application by using the user ID and password they were issued. If any other district staff members are to have access to *Transfer of Service-LEP* and/or *Transfer of Service-SPED* applications, the district administrator must authorize them as users. *Transfer of Service-LEP* users are not automatically authorized to use *Transfer of Service-SPED*. Please inform administrators and other staff members of the names and contact information for district staff members that are authorized to use *Transfer of Service-LEP* and/or *Transfer of Service-SPED*.

<u>To authorize additional users for *Transfer of Service-LEP* and *Transfer of Service-SPED*, the district administrator must:</u>

1. Sign into the user administration page at: <u>https://www2.dpi.state.wi.us/CMM</u> .   (Only the district administrator's ID and password can access this site.)

2. If the person you are authorizing DOES NOT appear in your main list, click on **<u>Add New User</u>**. If the person does appear in your main list, see step 5 below.

3. Enter the information for the new user. To provide access to *Transfer of Service-LEP*, check "Transfer of Service – Limited English Proficiency'. To provide access to *Transfer of Service-SPED*, check 'Transfer of Service – Special Education'.

4. **Save. This will return a page with an ID and password for the user. Print this page and give it to the user, who should keep it in a secure place. This is the only place the password will appear in writing. If it is forgotten, it must be reset**.

5. If the individual you are authorizing for *Transfer of Service-SPED* or *Transfer of Service-LEP* already appears on your main list, click "edit" to the right of that person's name. On the User Detail page, click on the appropriate Transfer of service box to extend authority to the desired application and or then click SAVE. The staff member will use the same user ID and password to access to each of the applications approved by the District Administrator.

6. To reset a password, the district administrator will need to sign into the user administration page and click on Edit to the right of the person's name. Then click Reset Password. The system will generate a new password for the specific end user. It is not possible for the district administrator to create a new password requested by the end user.

To start the process, you will need to login to the TOS Portal. From the **School Financial Services** home page (http://sfs.dpi.wi.gov/) the primary access point is as follows:

1. Scroll down the left-hand column and click on the "**Transfer of Service**" link near the bottom.
    a. Click on the **PI-5000 On-line Application** near the top of the page.
    b. At this screen you will be asked to login using your "ID" and "Password" and click on the green "Login" button.
        i. *Please remember due to the identification of specific students, security is of high importance in this process.*
    c. This is the "Status Summary" screen

Status Summary screen: A row of six tabs are located just below the bar and the "**Status**" tab is white, while the others are green. In the left-hand you will find links to the same screens. This feature provides you with options when moving between screens. Please check the "**Fiscal Year**" to confirm you are observing the correct school year.

As shared earlier, if your district has received an email notification regarding a Transfer of Service application submitted by another Wisconsin school district process this document is designed to guide you through **Part B** of the process.

- The center of the screen, below the "**Fiscal Year**", you will find a chart that give you a quick status report of any applications that have been filed in the fiscal year selected.
    o In the last line of the chart you see ⚠ and the following statement: "**Who's Waiting For Me to Finish a Part B:**"
- On the right side of the screen you will see the four (4) steps in the TOS process. "**Explanations**" or additional information is available to you by clicking on the links provided or scrolling down the screen.

To start the process select the "**Part B**" tab and you will be taken to the "**Part B Request: Master List**" screen. On this screen you should check the "**Fiscal Year**" for accuracy.

- The bottom half of the screen will provide you with a list of the current applications and each one with this symbol 🟢 under **Status** needs your attention. The ✔ symbol indicates that **Part B** has been completed.
- Please use the "**Edit**" to the right of the 🟢 symbol to proceed.

NOTE: You will be asked a series of questions over the next several screens. The answers you choose determine the questions that will follow. If the "**Next**" button is selected and not all of the required information has been provided, the Portal will not proceed.

- The next screen asks the **1st** question: "**Please check the option which best describes your understanding about this student's residency in the prior school year of 2011-12.**" And

you select one of the four possible answers, *please read each option carefully before making your selection*.

- o If you choose either "**A**" or "**B**" and click then "**Next**" button, you will advance to the next screen and the **2ⁿᵈ** question.
- o If you choose "**C**" and click then "**Next**" button, your work on "**Part B**" is now complete and the next screen will confirm this status.
- o If you choose "**D**" as your answer and click then "**Next**" button, you also need to name another district from the drop-down box to the right.
  - ▪ Your work on "**Part B**" is now complete and the next screen will confirm this status.

- Question **2ⁿᵈ** is on a separate screen: "**Check the option that is most applicable about the status of the student's residency in the current school year of 2012-13:**" you are provided with four possible answers, *please read each option carefully before making your selection.*
  - o If you select "**A**", "**B**" or **"C"** and click then "**Next**" button, you will need to enter specific dates related to the selection you made. You will have two options for entering the date.
    - ▪ Enter the number numerically (mm/dd/yy) or use the calendar button.
      - The Portal will not allow you to continue until a data has been entered.
    - ▪ Please note that a date range is provided from July 1ˢᵗ through today's date.
  - o Use the "**Next**" button to advance to the next question.

- The **3ʳᵈ** question is on a new screen. The Portal will show your answers from questions 1 and 2 and related information on this screen. The question you will now need to answer is: "**What date did they withdraw from your district?**"
  - o Enter the number numerically (mm/dd/yyyy) or use the calendar button and click the "**Next**" button to advance to the next question.
    - The Portal will not allow you to continue until a data has been entered.

- On a separate screen is Question **4**: "**Prior to --/--/---- (the withdrawal date you reported), did the student have an IEP in place due to the disabilities listed above?**"
  - o Your choice of answers: "**Yes**' or "**No**", then click the "**Next**" button.

- Question **5**, on the next screen, asks: "**Did your district reduce its costs as a result of this transfer?**"
  - o Your choice of answers: "**Yes**" or "**No**", then click the "**Next**" button.
    - ▪ Selecting "**Yes**" will take you to question **6** "**Instructions:**"
    - ▪ Selecting "**No**" will take you to question **7** "**Please review the following summary, and answer the certification question below.**"

- The next screen, **6** "**Instructions:**" will be the location where financial information and supporting statements are entered by the district regarding "**Yes**" answer to question 5.
  - o Use the **Tab** key on your computer or your **mouse** to advance to the next entry point.
  - o **A dialog box** is provided to allow the district to provide additional information that will support "**Other Savings – Specify**".

- o After all of the values have been entered use the **Return** key on your computer will click the "**Calculate Totals**" in the lower left-hand corner of the screen.
- The next screen, **7** "**Please review the following summary, and answer the certification question below.**" Contains a series of statements regarding this TOS application.
  - o Select either "**Yes**' or "**No**".

- The next screen says: "**Thank you for your response. No further action is needed on your part for this student.**"
  - o By selecting the "**Go to Part B Master List**" button you return to one of the earlier screens and now the 🟢 symbol under **Status** has been replaced by the ✔ symbol indicates that **Part B** has been completed.

Congratulations you have complete Transfer of Service for this application.

At this point the Transfer of Service application Part B has been submitted. You may wish to print this screen for your records.